

The Best of CONFR!

FOUR Great Workshops— All Available on One Day!

May 7, 2014

9:00am to 3:00pm (check-In begins at 8:30am)

Southern New Hampshire University, Hospitality Center, Manchester, NH

8:30am - Check-in Opens Coffee, Juice, Muffins and Networking

9:00am to 11:30am - Morning Workshops - Choose *ONE*

A. Raising Big Gifts in a Small Shop: A Simple Approach to Attracting Long-Term Results

*** All Levels: Essential for Executive Directors and Development Professionals who wear many hats AND for their Board Members.**

Presenter: Porter "Pete" Caesar, II, CFRE, Principal, Porter Caesar, LLC

Raising major gifts is a key component of all development plans as a way to achieve annual, special project and campaign goals. Any size organization can have a successful major gifts program but there are unique obstacles AND advantages for small organizations. This workshop will show you how to develop a major gifts program and the essential elements to make it succeed.

Topics Included are:

- Where major gifts come from
- Building relationships
- Board partnerships
- Making the Ask without stress
- Capitalizing on small shop uniqueness
- Measuring success

B. How to Use Analytics to Increase Effectiveness

*** All Levels: Essential for Executive Directors, Development Professionals, Finance Directors, Finance Committees**

Presenter: Jamie Forbes, Partner and Alexandra Urbanowski, Partner, Opus Advisors, LLC

There's a lot of talk about assessments, metrics, and outcomes, especially from donors and funders who want to know the effectiveness of their gifts. But once you have this information, what do you do with it? How does it help to answer the inevitable question, "What difference does your organization make?" To be successful and invite additional investment, nonprofits need to use their data to illustrate the impact the organization is making in its community and in peoples' lives.

Topics included are:

- Which self assessments and evaluations are most effective
- How to ask the right questions so you'll get back the data you need
- How to translate numbers into demonstration of impact
- How to use data to tell the story of your success to the world

11:30am to 12:30pm - Networking Lunch Pre-order a lunch from us or bring one with you - But be sure to attend this networking opportunity!

12:30pm to 3:00pm - Afternoon Workshops - Choose *ONE*

A. **Planned Giving Beyond the Jargon: Incorporating Legacy Giving into Small Shops** * Levels 1 and 2; Special emphasis on Executive Directors and Development Professionals of Small Organizations

Presenter: Al Cantor, Principal, Alan Cantor Consulting LLC

Presentations on planned giving often get bogged down in technical discussions of various gift vehicles. This knowledge is important, of course, but it's critical first to understand the larger picture: how do planned gifts work, and how do they fit into an individual donor's personal financial and philanthropic planning? We will cover the basic tax incentives, the importance of appreciated stock and other assets, and ways of recognizing a planned giving opportunity. We will discuss the central importance of the simple bequest. We will talk about how staff and board members can raise the subject delicately but effectively with their donors. And we'll do all of this in English, not legalese!

Topics included are:

- Two simple and effective steps you can take now to jumpstart a planned giving program
- How to recognize a planned giving opportunity
- How to raise the subject with your donors – and how to explain the concepts to them
- The characteristics of a planned giving prospect
- How to integrate planned giving into the rest of your development program
- The role that stock gifts play in introducing the subject of planned giving

B. **Best Practices for Development Professionals**

* Level 2: Essential for current and aspiring Development Directors

Presenter: Rick Blain, President, Richard R. Blain & Associates

This **intensive workshop** will explore the role of an organization's primary fundraiser and the principles and procedures that he/she will use to create the best fundraising program possible. Six essential "behind the scenes" building blocks will be explored and explained, including: Planning; Resources; Executing; Leadership; Stewardship; Tracking and Reporting.

Topics included are:

- The importance of a Development Plan, a Case for Support, timelines and assignments
- How to create an organization-wide culture of philanthropy
- How to make the Development Plan a working document for yourself, fellow staff, ED, board members and other volunteers
- Ensuring ethical and sound practices that match the values of the organization Valuing donors' goals, dreams and aspirations, and to create relationships and transparency
- Donor database systems for ease, accuracy, security and confidentiality

NOTE: Level 1 is introductory; Level 2 assumes foundational knowledge on the topic

Registration: Go to www.confr.org to register online or download a form and mail with a check; or call 603-724-6741.

Bring your staff AND board fundraisers to attend ALL these great workshops!

CONFR Members: \$59 Each Half-Day Workshop

The same person registering for TWO workshops by April 15 -- \$106 – a 10% discount

Non-Members: \$79 Each Half-Day Workshop

The same person registering for TWO workshops by April 15 for \$142 – a 10% discount

Lunch:

\$12.00 (You may order our buffet or bring your own lunch, but be sure to attend this networking opportunity!)

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